Creating a Consent

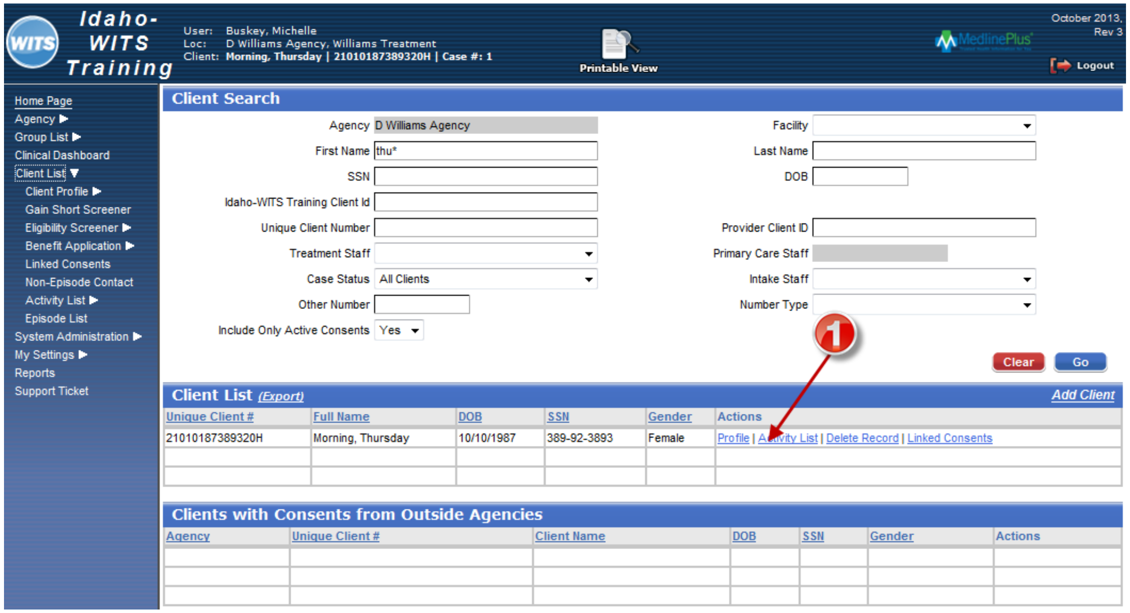
Create the Consent

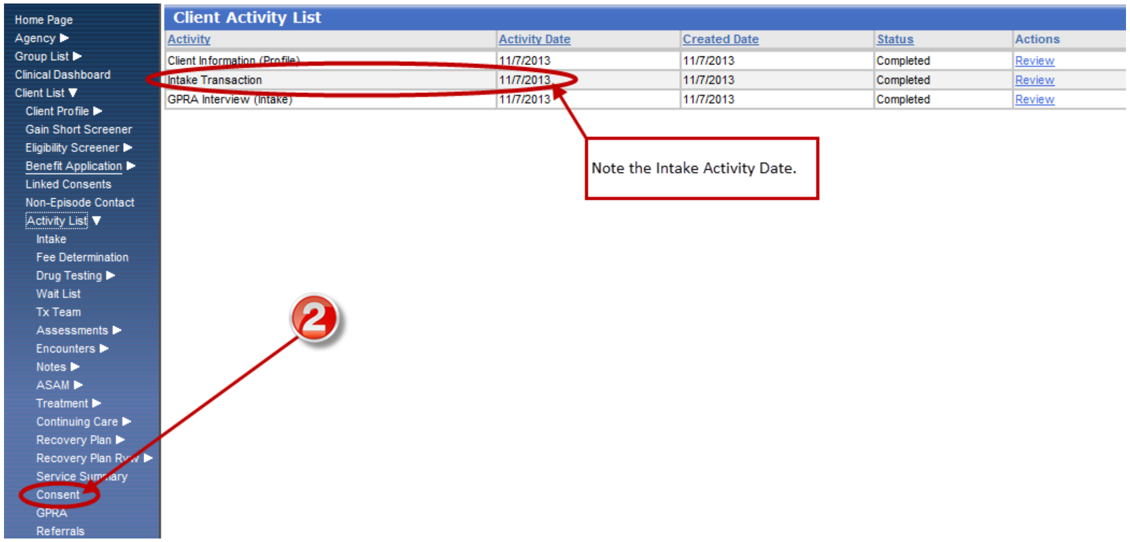
Utilize these instructions for consenting information.

1. **Getting here:** Login, select the **Facility,** select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **Activity List**.

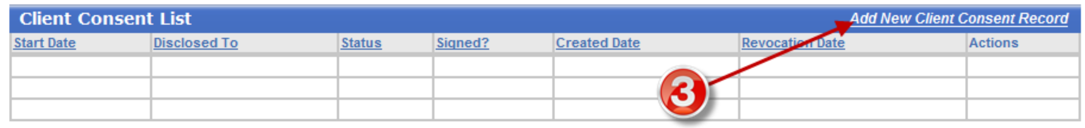
   NOTE: The Intake Activity Date will be used as the Earliest Date of Consented Activities on the Consent.

2. Select **Consent** on the Navigation Pane.





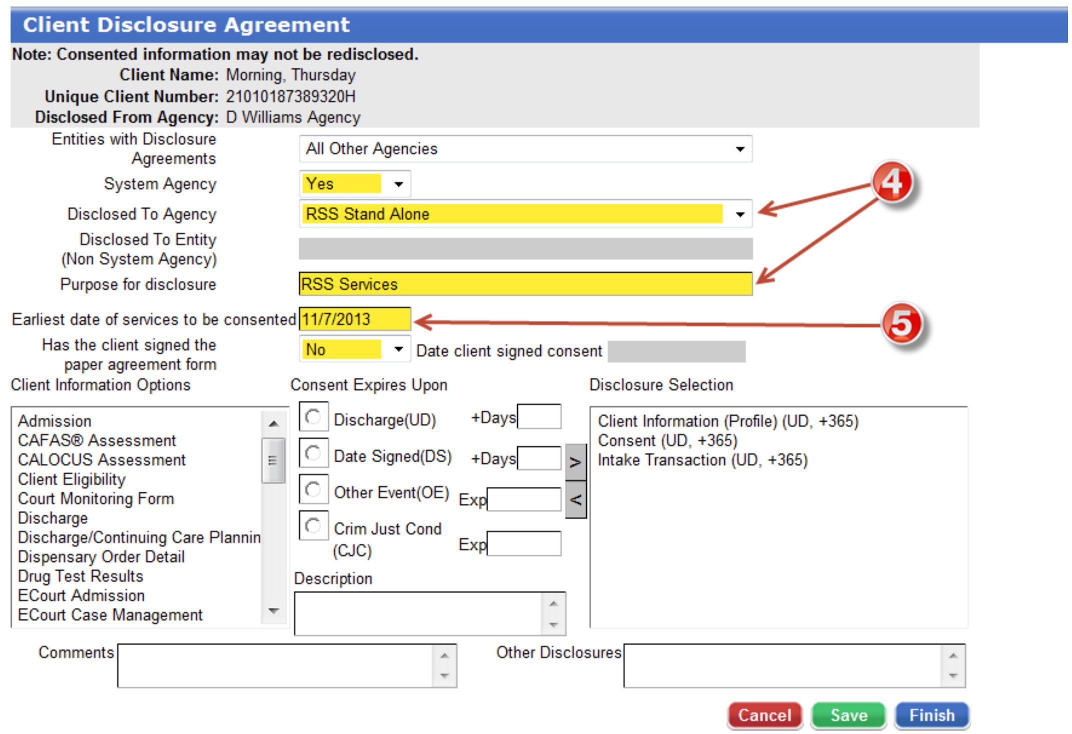
3. Select **<u>Add New Client Consent Record</u>**.



4. Select the **<u>Disclosed to Agency</u>** and enter the **<u>Purpose for disclosure</u>**. The **<u>Disclosure Selection</u>** will automatically populate once the agency is selected.

5. Enter the **<u>Intake Date as the Earliest date of services to be consented</u>**.

   Note: This determines the information that will be consented. If an Intake is selected to be consented, the Disclosed to Agency will not be able to see it if the date entered in this step is later than the date of the Intake. It is important to view the activity list prior to this step to verify the date consented activities were created.



6. Select **Yes** after the client has signed the Release of Information.

7. The Date client signed consent will default to today's date. Update as necessary.

8. Select **Save**.

NOTE: Select Print General Consent if you want to use the Release of Information generated from WITS.